



STANSBERRY ASSET MANAGEMENT

## **JOB DESCRIPTION – Sales Operations Representative**

Qualified candidates can apply at [trent.sadler@stansberryam.com](mailto:trent.sadler@stansberryam.com)

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### **General:**

Stansberry Asset Management is looking for a suitable candidate to assume the position of Sales Operations Representative (SOR). The firm is experiencing significant growth and plans to continue this trend by building out our sales team with qualified candidates. The role is characterized by supporting the various functions of the Senior Sales Representatives; acting as an intermediary between the sales team and the operations team. The SOR will help manage prospective investor meetings, virtually and in person. This position requires building investment knowledge, fundamental concepts in professional organizations, personal effectiveness, and great communication. The Sales Operations Representative will be working in a team environment with the majority of daily activity being assigned by the Senior Sales Representative.

### **Essential Functions (Responsibilities):**

- Support Senior Sales Representatives in setting up qualified in-person and over-the-phone meetings
  - Scheduling sales trips around the country
  - Managing/Drafting targeted marketing blasts
  - Gauging regional interest
- Create prospect investor presentations to support meetings
- Understand all the products & services offered by SAM and be able to communicate them succinctly and effectively
- Aid in the development and implementation of SAM's business intelligence tools (Salesforce, Pardot, Phoneburner, Duplicate Check, etc.)
- Communicate and follow up on project issues in a timely manner – complete assigned workflow tasks with minimal backlog
- Organization – help team members in assessing and implementing necessary technology solutions and process changes
- Team Knowledge - stay current with industry standards, market updates, and information coming directly from the Stansberry Research Investment Newsletter
- This role can be located in San Mateo, CA, New York City, or remote options available

### **Qualifications/Requirements:**

- Associate or bachelor's degree, ideally with a focus in Business, Finance, Accounting, or Marketing
- 1-3 Years work experience in the financial industry, sales or marketing experience a plus
- Passion for the investment industry
- Excellent computer skills (MS Word, MS Excel, Adobe, Salesforce, Docusign)
- Demonstrated ability to work cross functionally in teams
- Interpersonal and customer service skills
- Excellent written and verbal communication skills, especially over the phone
- Must be dependable, trustworthy and punctual
- Attention to detail, self-directed work, and high level of organization is a must

